Proxies and Delegates

MyTravel

Introduction

This supplement provides information about Proxies and Delegates – how to create them, and how they function in MyTravel. If you are using an online version of this supplement, selecting the links in it will take you directly to other resources, though if needed, you'll find the applicable URLs at the very end of this guide.

Note: For best results, use the Chrome browser to access MyTravel.

Proxy vs. Delegate

Proxies and Delegates are two very different roles, though they do have some similarities. For example, they both work with trip requests and expense reports for someone else; however, the actions they can take in those documents are very different.

1. **Proxy:** Proxies can handle documents for any member of their assigned group (a.k.a., an organization), but they have limitations to what they can do for others. For example:
    a. They cannot make reservations for other people, so they are limited in the scope of assistance they can provide to Travelers.
    b. They cannot approve documents, so they cannot serve as backup Approvers.
    c. Despite these limitations, they are excellent candidates to serve as an organization's help desk function, for example.
2. **Delegate:** A Delegate is assigned directly to a Traveler or Approver, and is a good choice to serve in two types of positions:
    a. They can be assigned permanently to a Traveler, which makes them an excellent choice to serve as a travel clerk, administrative assistant, or similar function.
    b. When assigned to an Approver, a Delegate serves as a temporary (up to 180 days) replacement when the Approver is away from the office, say on TDY or leave. An Approver Delegate must meet the same requirements as any other Approver, which means they must have the Approver role selected in their MyTravel profile, must have a DD Form 577 on file, and must take all required Certifying Officer Legislation training.

Appointing a Proxy or Delegate

Appointing a Proxy requires a permission level not regularly provided at the organization level. If you need to appoint or become a Proxy, contact your Component Coordinator, who will pass word up to the Defense Travel Management Office (DTMO) to request Proxy appointment.

Appointing a Proxy or Delegate *(continued)*

To appoint a Delegate:

1. Access the **Expense Delegates For <Name>** screen (Figure 5) by starting on the MyTravel home screen and using either option a or b below, depending on your role:

    a. If you are an Employee Administrator appointing a Delegate for someone else:

        i. Select **Administration** > **Company** > **Company Admin**, then on the **Company Administration** screen, select **User Administration**. The **User Administration** screen opens. All these steps are visible in Figure 1.

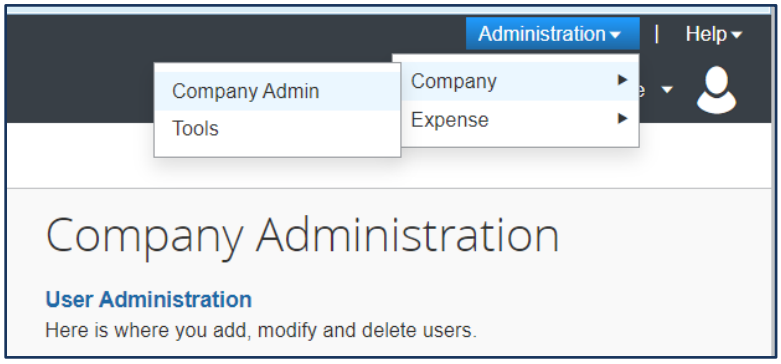

Figure 1: Employee Administrator's Profile Access Options

        ii. On the **User Administration** screen, search for and open the profile of the person who needs the Delegate assigned to them.

        iii. On the profile update screen, scroll down to the *Expense and Invoice Settings* section (Figure 2) and select **Expense Delegates**. The **Expense Delegates For <Name>** (Figure 5) screen opens. Go to step 2.

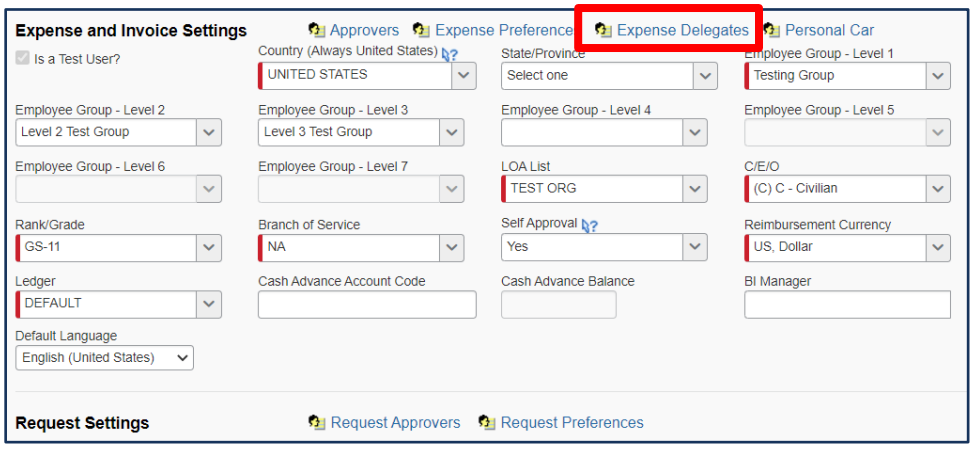

Figure 2: Profile Update Screen: Expense and Invoice Settings Section

    b. If you not an Employee Administrator, you can select your own Delegate:

        i. Select **Profile** > **Profile Settings** to open the **Profile Options** screen (Figure 4). Both of those steps are visible in Figure 3.

Appointing a Proxy or Delegate *(continued)*

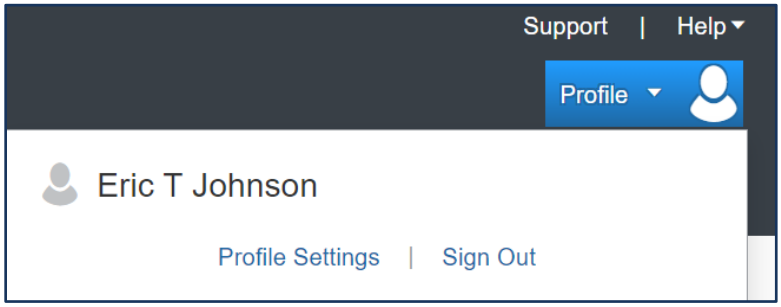

Figure 3: Profile Options Access

ii. On the **Profile Options** screen, select **Expense Delegates**. The **Expense Delegates For <Name>** screen (Figure 5) opens.

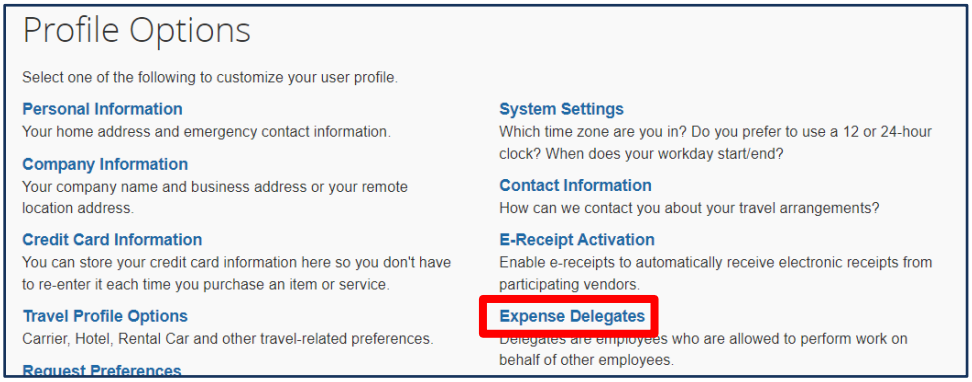

Figure 4: MyTravel Home Screen: Expense Delegates Option

3. On the **Expense Delegates For <Name>** screen (Figure 5), make sure the **Delegates** tab is open. If it isn't, select it to open it. On that tab:
    a. Select **Add**.
    b. Start typing the name of the person you want to appoint.
    c. When you see the prospective Delegate's name in the drop-down menu, select it.
    d. Select **Add.** The screen updates to show the selected person and the check boxes you use to give them permissions (Figure 6).

    All of the above options are visible in Figure 5.

Appointing a Proxy or Delegate *(continued)*

Figure 5: Expense Delegates For <Name> Screen, Delegates Tab Open

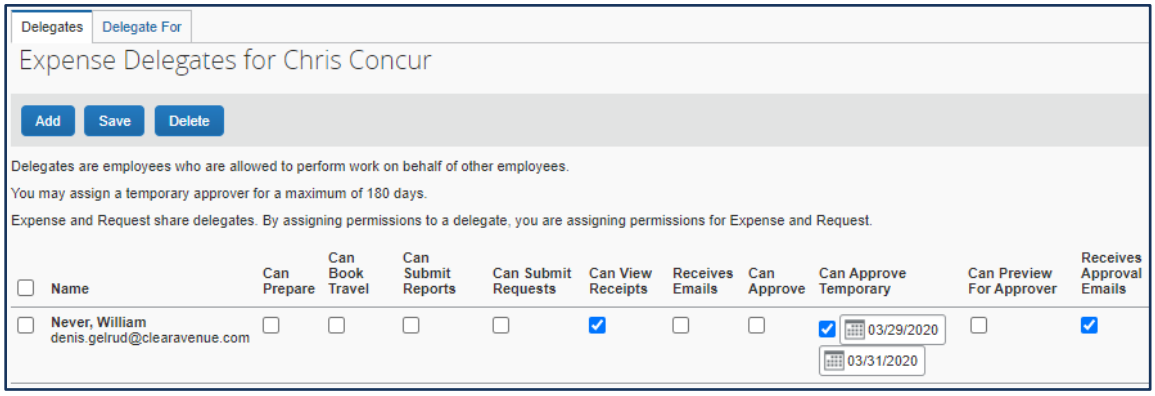

Figure 6: Expense Delegates Screen, Check Boxes

4. Not all of the check boxes visible in Figure 6 appear in every situation. Of those that do appear, select the duties you want this Delegate to be able to perform for this person. Unless otherwise stated, items a-f are available for all Delegates. Items g-j are only available when assigning an Approver Delegate. Options include:
    a. **Can Prepare**: Allows them to create trip requests and expense reports.
    b. **Can Book Travel**: Allows then to make reservations.
    c. **Can Submit Reports***: Allows them to submit expense reports for approval. This box only appears if you are an Employee Administrator.
    d. **Can Submit Requests***: Allows them to submit trip requests for approval.
    e. **Can View Receipts**: Allows them to see attached receipts.
    f. **Receives Emails**: Allows them to receive the same emails as the Traveler.

Appointing a Proxy or Delegate *(continued)*

g. **Can Approve**: Allows them to approve documents for 180 days starting today.

h. **Can Approve Temporary**: Allows them to approve documents for a specified time period, which can't exceed 180 days. Overrides **Can Approve** if you select both.

i. **Can Preview For Approver**: DoD does not allow you to select this item. It may cause processing to stop on a document.

j. **Receives Approval Emails**: Allows them to receive the same emails as the Approver.

*If you don't have permission to submit, a **Notify Traveler** button replaces the usual **Submit** button in documents. Select it to let the Traveler know you're done with the document. Similarly, if your Approver Delegate permissions have expired, a **Notify Approver** button replaces the usual **Approve** button. Select it to remind the Approver that the document is awaiting their action.

5. Select **Save**.

Start Working as a Proxy or Delegate

Whether you are a Proxy or a Delegate, you essentially work the same way in MyTravel.

1. Log into MyTravel. The MyTravel home screen opens.
2. On the MyTravel home screen, select **Profile** (Figure 7, indicator #1) in the upper right corner. A drop-down menu appears.

   Note: At this point, everything on the home screen relates to your own travel documents.

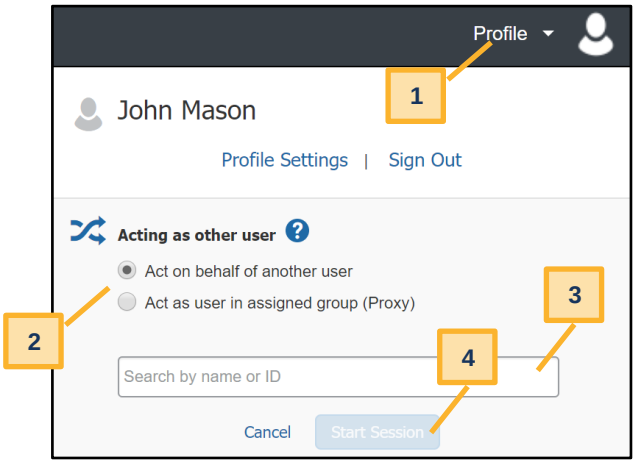

Figure 7: MyTravel Home Screen with the Profile Drop-Down Menu Open

3. In the *Acting as other user* section (Figure 7, indicator #2), select the **Act on behalf of another user** radio button to start working as a Delegate or select the **Act as user in assigned group (Proxy)** radio button to start working as a Proxy. **Note:** You will only see both radio buttons if you are assigned as both a Proxy and a Delegate.
4. Select the **Search by name or ID** field (Figure 7, indicator #3) to see a list of people whose documents you've recently accessed (see Figure 8, indicator #1). If you type in that field, the list updates to display a list of people whose name matches the search string you enter.

Start Working as a Proxy or Delegate *(continued)*

5. When you see the name of the person whose documents you want to work with, select it. The selected name populates the **Search by name or ID** field.

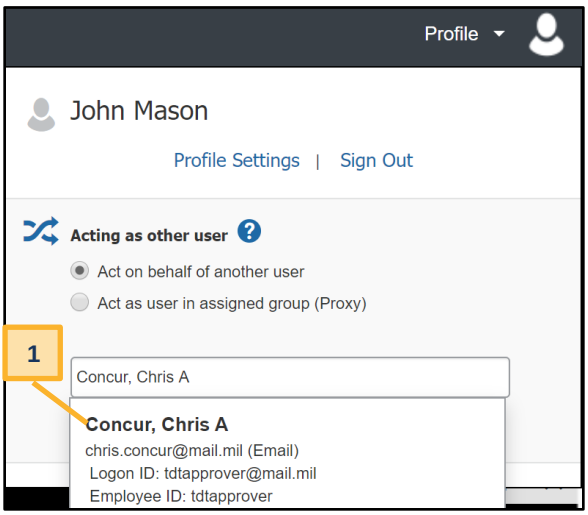

Figure 8: Other User Selection

6. Select **Start Session** (Figure 7, indicator #4). The home screen refreshes to display the selected person's home screen layout. Also, the **Profile** area in the top right corner of the screen displays a green field with a two-person icon (Figure 9) that shows you are now working as a Proxy or Delegate, and for whom.

Figure 9: Proxy or Delegate Icon

Notes:

1. At this point, all the displayed information relates to the person named in the green **Acting as <name>** area.
2. The boxes checked by the person who appointed you determine your permissions. For example, you may be able to work only with trip requests or expense reports, or you may be able to access both. You may be able to only create and edit them or you may be able to submit them as well.
3. If you need access to a document type or need to take an action the system won't currently allow, see the *Appointing a Proxy or Delegate* section of this supplement.

Switch to Another Person's Documents

To start working for a different person, select the green **Acting As <name>** area (Figure 10, indicator #1). When the drop-down menu opens, search for and select the new person in the **Search by name or ID** field (Figure 10, indicator #2), then **Start Session** (Figure 10, indicator #3). The screen refreshes to display the new person's home screen layout and travel documents.

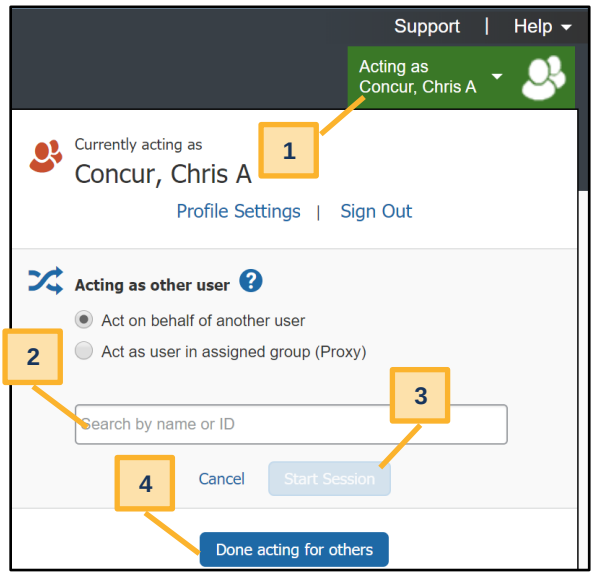

Figure 10: MyTravel Home Screen (Detail)

Stop Working as a Proxy or Delegate

When you finish working with other people's documents, select the green **Acting As <name>** area. When the drop-down menu opens, select **Done acting for others** (Figure 10, indicator #4). The screen refreshes to display your own home screen layout and travel documents.

Mandatory Document Reminder

The DoD Financial Management Regulation (DoD FMR) requires all Travelers to prepare and sign their own claims for payment. When someone else will submit the claim for them, the Traveler must complete and sign one of the following forms:

- Department of Defense (DD) Form 1351-2 upon completion of TDY travel.
- Optional Form (OF) 1164 following official travel in the local area.

The Delegate or Proxy must attach the Traveler's signed form to the expense report. MyTravel reminds you of that requirement on the **Final Review** screen (Figure 11, red highlight). You must attach the appropriate form before you select **Accept & Submit**.

Mandatory Document Reminder *(continued)*

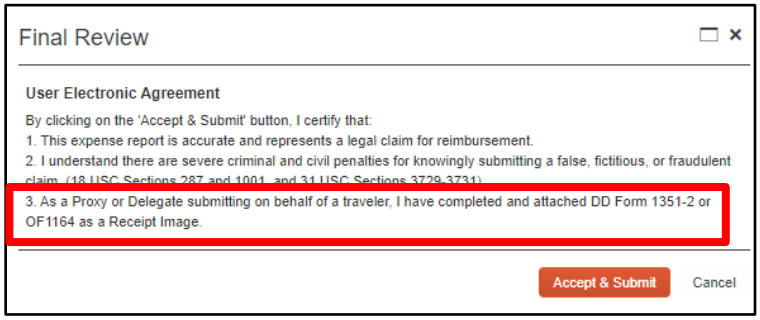

Figure 11: Mandatory Document Reminder

Additional Resources

The items on this list provide the URLs for additional information you may find useful. Some of them are mentioned elsewhere in this guide.

1. Vendor-created User Guides and Demonstrations
   https://www.concurtraining.com/toolkit/en/expense/end-user/ui02
2. MyTravel direct link
   https://dodtravel.concursolutions.com

In addition, you can find many helpful user guides and other informational papers:

- On the DTMO website's **MyTravel** screen at https://travel.dod.mil/Programs/DoD-Travel-Systems/MyTravel/
- By logging onto MyTravel at the link in #2 above, then selecting **Help** in the upper right corner of the screen, then **Training** on the drop-down menu.